PACKAGING

THE CAHNERS MAGAZINE FOR DECISION-MAKERS/DECEMBER 1988

NEW GAMES BECOME PART OF PACKAGE

Snack Line Solves Tight Space Problems

The Five Hottest New (And Old) Food Packages

Bright Ideas Spur Closure Advances

New Techniques For Packaging Meats

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EDITORIAL OFFICES
DES PLAINES, ILL. 60017-5080
Cahners Plaza
1350 E. Touhy Ave. P.O. Box 5080
312/635-8800

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PACKAGING NEWS

P&G Tests 100% Recycled PET For Cleaner Bottle

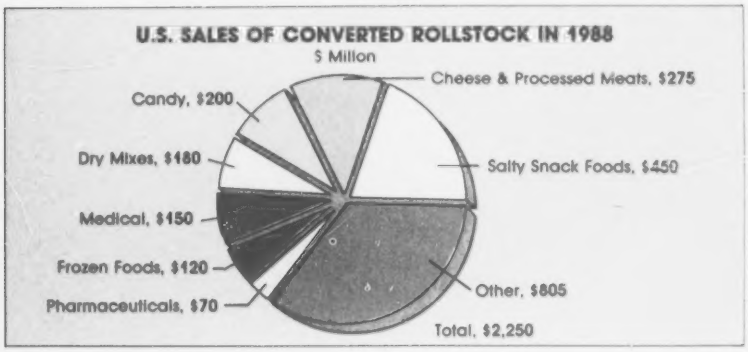
Makes joint announcement with bottle molder Plastipak

Packaging giant The Procter & Gamble Co. will test market a 15-ounce Spic & Span Pine cleaner bottle made from 100 percent clear post-consumer recycled polyethylene terephthalate (PET).

Charles Wosaba, manager of packaging R&D for P&G, made the announcement flanked by personnel from bottle molder and joint developer Plastipak Packaging Inc. The molder has already made several batches of the bottles, and a "market trial" will begin in early 1989. Test geography and protocol are still being developed, according to P&G.

The Spic & Span bottle was chosen because it is small, molds and production know-how are already available, and it was judged that product interactions with the recycled PETE would be minimal.

Plastipak is reportedly still "firming up" its supply of recycled resin and processing conditions. Current suppliers were not named.



Rollstock Converters Could Be Takeover Targets, Study Says

Thirteen U.S. firms have owner of retirement age, market is growing

A study just released by Kline & Co. examines the U.S. converted rollstock market as a corporate raider might see it. The $2.25 billion U.S. market, growing at 5 percent per year, offers attractive but often overlooked "investment opportunities," according to the study.

Most suppliers of converted rollstock hold secure positions in distinctly different end-use markets, says the report. However, some of the best are easily overlooked, since 27 of the 39 profiled by Kline are privately held, and 11 are small operations of large corporations. Only one public firm has all of its sales in converted rollstock.

The Kline report targets several of the privately held companies as attractive acquisition targets, identifying at least 13 firms with a principal owner of retirement age.

This 120-page report is the first in a series entitled *Investment Opportunities in Packaging, 1988-1989*. For details circle Reader Service No. **417**.

NFPA Fights Country-Of-Origin Labeling Proposal

Relabeling will hurt food processors, industry group claims

Imposing additional country-of-origin (C O) labeling requirements on food products would be costly, unnecessary and protectionist, an executive of the National Food Processors Association (NFPA) told a Congressional panel recently.

Testifying before the House Committee on Ways and Means Trade Subcommittee, NFPA executive vice president for public affairs Lawrence T. Graham said attempts to require the C O on labels of products that have been "substantially transformed" through processing in the U.S. serves to "punish U.S. manufacturers and workers and it acts as a serious disincentive to the American food industry."

Graham argued that the actions of the U.S. Customs Service will trigger costly relabeling efforts for the food industry, particularly for those companies that frequently change the source of their ingredients depending on price and availability. Further, he said, C O labeling will discourage processors from developing new products, many of which necessarily include foreign ingredients.

Major Firms Scramble To Find CFC Alternatives

DuPont, Allied-Signal announce substitution plans

Amid continuing concern over the effect chlorofluorocarbons (CFCs) are having on the Earth's ozone layer, the top two domestic producers of CFCs have made separate announcements regarding production of alternative products.

DuPont Co. has said it will invest more than $25 million to build the first commercial-scale plant to produce a product known as HFC-134a. The substance is reportedly an alternative for CFC-12, which is used for refrigeration and air conditioning applications. However, the plant's capacity will be used primarily for expanded market development, and to provide data for a future "world-scale commercial facility" for HFC-134a, according to the firm. In March 1988, DuPont announced that it will phase out production of CFCs.

Meanwhile, Allied-Signal Inc. said it will increase by 75 percent the number of scientists working on finding and developing non-ozone depleting substitutes for CFCs. Personnel at the firm's Buffalo research facility, dedicated to fluorine-based chemistry, are focusing their research efforts on the development of a full line of "environmentally safe alternatives to CFCs", according to Allied-Signal.

The firm had announced its collaborative research effort with Atochem, Europe's largest CFC producer, also in March of this year.

Quaker Sells Can-Making Equipment to Heekin Can

Closes Indianapolis facility

Heekin Can Inc. continues its policy of acquiring assets from self-manufacturers with its recent purchase of can-making assets from Chicago-based Quaker Oats. Heekin bought the can-making equipment from Quaker's Indianapolis facility and the food processor closed the plant in November. No purchase price was announced.

Cincinnati-based Heekin will continue to supply cans to Quaker's Gatorade-Van Camp processing facility under terms of a multi-year agreement. A Quaker spokesperson cited excess capacity and necessary capital investment as key factors in the firm's decision to close the plant.

In its third-quarter profit report, Heekin commented on the acquisition: "As in last year's purchase of the Stokely USA can plant, we expect this acquisition to increase our revenues by approximately 15 percent. Heekin plans to continue to use a growth strategy based on acquisitions of self-manufacturers' can-making assets."

5 Food Packages Consumers Love

There's a good reason so many new products appear in one of these five package forms—shoppers love them

By **Melissa Larson** Senior Editor

Consumers are a fickle lot, says the common wisdom. They buy whatever is depicted in the latest commercial, and will switch brands at the drop of a coupon.

But they do stick with packages they like. We've found that food marketers in several specific categories, where the competition is particularly keen, have hedged their bets by introducing the product in one of five package types that have become consumer favorites. Three of them are relatively new to the supermarket: the single-serve aseptic cup, the dual-ovenable paperboard tray, and the multilayer film bag. The other two are old stand-bys which still compete strongly in many categories: the metal can and the wide-mouth glass jar.

To better understand why these five food packages are favored by shoppers, it helps to take a look at our recent Consumer Survey (June 1988). Consumers were asked to rate which package criteria are most important when they are

15 TOP-SELLING CANNED FOODS

Category	Millions of Dollars
Soups	1,781.9
Tuna	1,404.9
Pasta Dishes	503.1
Beans/Pork & Beans	470.3
Corn	449.0
Green Beans	370.3
Tomatoes	365.8
Evaporated Condensed Milk	358.4
Tomato Sauce	332.5
Apple Sauce	288.1
Peaches	284.3
Pineapple	278.9
Chili	278.4
Hams & Bulk Meats	269.4
Kidney & Misc. Beans	254.3

Source: Canned Food Information Council. Does not include information on pet foods.

Pet owners know that the metal can, complete with easy-open pull tabs, provides a barrier to sight and smell—and a good value.

Clarity of glass shows off premium sauce ingredients

considering purchasing food products.

Flavor preservation, value for the money and tamper-evidence, in that order, are the three most important package attributes shoppers look for. (See chart on opposite page.)

Convenience of resealing, storing and opening are ranked next, in order of importance. Microwavability ranks below these first six, at least for the time being.

Processing ease and safety do influence packagers' container choices, of course. But our five "hot" packages also do an above-average job of fulfilling consumers' top purchasing criteria.

Metal cans

Of course consumers buy soup in them. But what other marketers choose the metal can? And what is the source of its enduring consumer appeal?

The answer lies partially in the metal can's great flexibility. Aluminum and steel, from No. 10 down to the 4-ounce size, printed or labeled, each type has found a niche.

Top consumer purchasing criteria for food products packaging provide more clues. For flavorful, hearty foods that can stand up to retort, the canned product is an extremely good value for the consumer, and you can't get much more tamper-evident.

For the new wave of higher-priced, "gourmet" pet foods, metal cans are the overwhelming choice. Since most pet owners would rather not see or smell kitty's dinner until it's time to serve, the can's opacity and sturdy barrier are assets. And the new array of single-serve sizes, with pull-tab lids, means no opener is needed, and no storing of smelly leftovers.

Fancy sauces can be microwave-heated and served right from the wide-mouth glass jar.

Marketers of canned meats and meat spreads are loyal users of metal cans, for many of the same reasons. This canned food category was one of the fastest-growing in 1987, according to the Canned Food Council—although it still hasn't cracked the top 10. (See chart.)

Canned ethnic foods, including everything from refried beans to hot-pepper sauces, are spicing up the prepared-foods aisle. These strongly flavored specialty products are becoming more mainstream, propelled by trends toward cooking-at-home and sampling different cuisines.

For those without the time or inclination to search out the fresh ingredients, prepared ethnic sauces, rice and pasta dishes are quick and easy alternatives.

Wide-mouth glass jars

Dismissed as clunky, expensive and prone to shatter just a few years ago, glass packages are back. The glass industry has energetically stressed the flavor retention qualities, microwavability and recyclability of glass packages.

Appetizing pasta sauces and pasta-and-sauce entrees in wide-mouth jars have opened up a whole new category catering to the different sauce tastes of pasta-loving middle America.

Being able to see the various ingredients, quickly heat the contents in the microwave, pour them from the wide-mouth container, and easily replace the screw-on cap to store the leftover sauce, has enormous consumer appeal.

It's no wonder that marketers of every kind of pasta or cooking sauce, from simple and hearty spaghetti pour-overs to exotic and upscale clam and Alfredo sauces, turn to the wide-mouth glass jar. In fact, the appearance of premium sauces has helped, by association, to establish the glass jar as a premium food package.

Chicago's tony retailer Marshall Field's, which has developed a wide variety of private label gourmet foods, recently introduced its Lone Star Grill line of Tex-Mex sauces, packaged in glass jars.

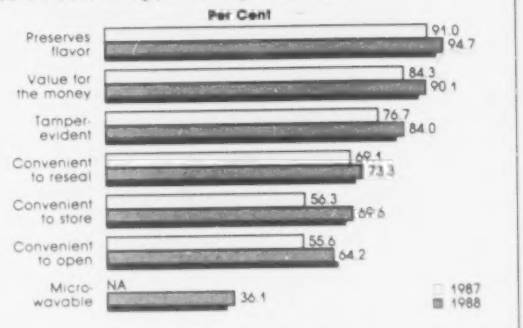
Also, many regional and gourmet items use the combination of a glass jar and a metal screw cap to invoke the "home-canned" appeal of fresh ingredients and an original recipe. Perhaps the best example is International Gourmet Specialties' Classico line, which uses actual canning jars to evoke a home-made image.

And Carnation Co. is testing Contadina Premium Pasta Sauces on the East Coast in glass jars. Television ads tout the sauces' premium ingredients, which are readily visible above and below the wraparound label.

Consumers love the convenience of cooking and eating in the dual-ovenable paperboard tray

MOST IMPORTANT PACKAGE FEATURES—FOOD

How important are each of the following characteristics when you are considering purchasing food products?



Single-serve cups have kids eating better at school and home

Aseptic plastic cups in multipacks are the latest way for children to eat better away from home.

Upscale sauce flavors include Alfredo, spinach and Parmesan, Italian clam, tomato and mushroom, tomato and garlic, and tomato and Italian sausage.

Dual-ovenable paperboard

As recently as three years ago, the frozen vegetable display was dominated by flat stacks of poly bags and paperboard boxes, the contents of which were dumped into boiling water on the stove.

Today, the frozen vegetable shelf facing is a more colorful place, and single-serve vegetables have become something of a consumer impulse item—thanks in part to the single-serve, dual-ovenable paperboard tray. Frozen vegetables in all varieties have entered the microwave generation in this convenient, cook-in package.

Budget Gourmet was the first brand to package its entrees and side dishes in Westvaco's Ovenware trays. Consumers were attracted to the slick lid graphics, and found that the package was convenient to microwave, eat from and throw away. Reportedly the line achieved annual sales of $100 million in its first year.

Then Stokely USA introduced Stokely's Singles, single-serve vegetable side dishes packaged in two- and four-packs of the paperboard trays, separated by a perforation. Although the multipacks presented some in-store challenges at first, consumers liked the single-serve frozen vegetable concept from the beginning—and the category has taken off.

Tennessee-based Union Foods has introduced its PictSweet Express single-serve frozen vegetables in Federal Paperboard's Dio-Tray—a one-piece dual-ovenable tray with similar graphic possibilities and cooking procedures.

In addition to appreciating the appetizing graphics and the convenience of cooking in, and eating out of, the same package, early supplier research indicates that consumers favor the paperboard trays because they perceive them as being less "package-intensive."

In other words, there is less packaging to open and then throw away later.

Further, it is well documented that consumers consider frozen vegetables a good value, and realize that they retain more of their nutrients than canned vegetables.

Single-serve cups

Single-serve plastic cups for applesauce, yogurt and pudding have led the new-product charge to the supermarket this fall. (See November 1988 issue, "Rigid Plastics Respond to Key Food Markets.") Targeted as a back-to-school convenience for busy parents, these cups can be found in the refrigerated section and in the canned fruit and snack aisles.

Marketers of these products are capitalizing on consumers' desire for better nutrition on the run, whether the cups are carried in lunchboxes or briefcases.

Although consumers are willing to pay more for the perceived nutrition and convenience of these products, multipacks of various types provide at least a perception of better value.

Flavor preservation of these aseptically-processed plastic cups also appears to be acceptable. Consumers are accustomed to yogurt in plastic cups, and they don't appear to find the pudding products very different in

taste from the home-mixed variety.

Applesauce in plastic cups may suffer the most from comparison with the taste of product in glass jars—but shoppers apparently feel the convenience of a disposable single-serving is worth any slight reduction in flavor.

Heat-sealed lidding on plastic cups provides a degree of tamper-evidence, as well as space for full-color graphics and selling language. Paper carriers for some multipacks also provide graphic possibilities.

The brand names associated with these single-serve multipacks enchance consumer acceptance. Known names such as Del Monte, Hunt's, Dannon, Swiss Miss and Light 'n Lively inspire consumer confidence in the quality and safety of these products.

Flexible film bags

Metallized, opaque or transparent film bags for snacks are great examples of packaging that upgrades consumer perception of the product.

Shoppers are willing to pay more money for less product, as long as the glitzy four-color bags keep the great tastes, and the crunch, intact. U.S. domestic sales of salted snacks reached the $8 billion mark for the first time in 1987, according to the Snack Food Association.

Flavor and aroma preservation for these snacks are the strong suit of multilayer bags. And most major brands use gas to puff up the bag and give it that pleasingly plump appearance.

Heavy promotional spending by major brand marketers, and the truly stunning design and process printing of the shiny bags have helped lure consumers to their first taste of Cajun chips, white cheddar popcorn and ranch-flavored pretzels.

Recloseable features are starting to appear on a few smaller or regional snack brands, but it remains to be seen whether that is a significant-enough consumer hot-button to make a difference. Once consumers get their first crunch of some new flavor, they may prefer to eat the entire bag at once.

In the search for an edge in new food product introductions, smart marketers are finding that consumers can indeed be loyal—to a package. ■

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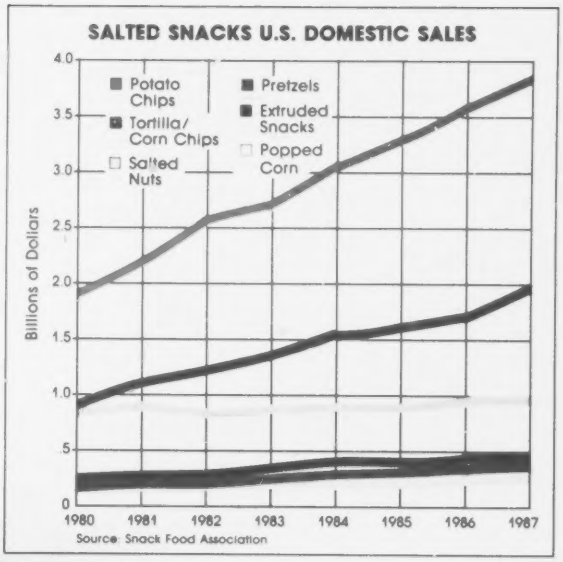
Outstanding	460
Above Average	461
Average	462
Below Average	463

MELISSA LARSON
Senior Editor
"Think of your favorite food packages, and why you like them. Some may be high-technology containers that do a difficult job, and others are old standards which offer value and security. Food marketers are paying more attention to your attitudes on packaging."



Great taste and glitzy graphics are the strong suit of multilayer film snack bags.